

The contracting process for CIP funded A&E contracts valued under \$1,000,000.00 and for non-CIP funded A&E contracts valued under \$250K utilizing the RFP process is as follows:

1. The Project Manager (PM) requests the A&E Project Request Form from the Public Works Contracting Group (PWCG) Consultant Services Coordinator (CSC). With the Project Request Form the CSC will email instructions regarding completion of the form. The PM will provide PWCG with:
 - a. A completed A&E Project Request Form including a WBS or Internal Order number open to PWCG,
 - b. The Scope of Services, and
 - c. Completed Human Resources (HR) Approval form with authorization signature from HR liaison.
2. Upon receipt of proper project intake documentation (see above), the CSC provides the Contract Number (H#####), assembles a draft Request for Proposal (RFP), a draft advertisement and a draft agreement for the PM's review.
3. At this point, the CSC provides all standard correspondence and forms to the PM.
4. Upon approval from the PM, the CSC advertises the RFP in the City's official newspaper and on the City's websites for a minimum of 30 calendar days. Depending on funding sources, the RFP could also be advertised in several minority focused publications.
5. The CSC chairs, and the PM attends, the pre-proposal meeting where questions and clarifications are addressed. In the Public Utilities Department, a Senior Contract Specialist may chair the pre-proposal meeting.
6. After a minimum of 30 days, interested consultants submit their responses to the RFP (proposals) and proposals are reviewed for completeness by the CSC. At this time, any exceptions to the Draft Agreement in the RFP are addressed between the Consultant firm and PWCG.
7. Once the proposals have been reviewed, they are sent to the PM for the shortlisting phase. Shortlisting is normally done when more than 7 or 8 proposals are received. Otherwise, PMs usually interview all interested consultants. The PM forms a Selection Panel and conducts a Shortlist Selection Panel Meeting. The purpose of the Shortlist Selection Panel Meeting is to select the most highly ranked firms for the purpose of conducting interviews. Only shortlisted firms will be invited to participate in the interview process.
8. The PM chairs the Shortlist Selection Panel meeting, presents the scores to the panel for their consideration, and obtains consensus for the shortlist selection.
9. The PM prepares a memorandum for the director's approval of the recommended shortlisted firms immediately after the Shortlist Selection Panel Meeting is adjourned. After director approval is obtained and provided to PWCG, the PM proposes and schedules the date for interviews after the panel's recommendation has been finalized.
 - a. A minimum of three (3) weeks should be allowed for proposers to prepare for their presentation but more time should be allowed if the project is complex.

- b. The Interview Panel shall be comprised of the same individuals who were on the Shortlist Selection Panel.
- 10. The PM forwards shortlist approval and interview time, date, and location to PWCG.
- 11. The PM, in accordance with the standard correspondence and forms provided:
 - a. Mails notification to successfully shortlisted firms, and
 - b. Mails notification to non-shortlisted firms.
- 12. The PM prepares interview script and ranking summary sheets.
- 13. The PM notifies Selection Panel of impending interviews.
- 14. The PM chairs the interview process and compiles the scores for each consultant interviewed.
- 15. The PM summarizes and verifies the scores of each consultant.
- 16. The PM prepares memorandum for the director's approval immediately following finalization of scores.
- 17. Upon receipt of the initiating department director's approval, PM notifies all participants of the results of the interview process and the selection by calling each proposer on the telephone. Proposers shall be notified that they are entitled to a debriefing session, upon their request, from the PM.
- 18. The PM, in accordance with the standard correspondence provided:
 - a. Mails notification to selected firm(s), and
 - b. Mails notification to non-selected firms.
- 19. The PM begins negotiations with the most highly qualified firm. If PM is unable to finalize negotiations with the most qualified firm, the PM will terminate negotiations with the firm and begin negotiations with the next most highly qualified firm and so on, until an agreement is reached.
- 20. The PM verifies with the CSC that the boiler agreement contained in the original RFP is still in effect. If a new boiler is necessary it will be provided at this time.
- 21. Once the PM finalizes negotiations, the PM forwards a Draft Agreement to PWCG for review. Only the boiler obtained from PWCG shall be used. No other boilers are acceptable. The PM adds their project specific information to the boiler and returns the Draft Agreement to PWCG for review. **The consultant does not sign the agreement at this stage of the process.** The Draft Agreement must be submitted to PWCG in **Microsoft Word** format and must include the completion of all data fields in the boiler as well as:
 - a. Exhibit A – Scope of Services,
 - b. Exhibit B – Compensation Schedule, and
 - c. Exhibit C – Time Schedule (Not applicable to As-Needed contracts).

Incomplete Draft Contracts will be returned to the PM. After PWCG reviews the draft agreement, the project manager shall forward the draft to their department's Deputy City Attorney for review. Once this review process is complete, the project manager can forward four (4) PDF or hard copies of the agreement to the consultant for final signature.

22. The PM may start the routing of their award document (Form PA 2625, 1544 or E-1472) at this time. At this time the PM should also update their Purchase Requisition to include the name of the selected consultant and the contract number for the project. The contract number should be typed into the "Texts" field.

Note 1: Form PA 2625 (for CIP funded contracts) or Form 1544 (for non CIP funded contracts) are generally used. However, for non CIP funded contracts, if the selected consultant has been awarded more than \$250K in contracts or amendments in the current fiscal year (including the current award), City Council approval (via E-1472) will be required in order to award the contract. For CIP funded contracts the current fiscal year award threshold is \$1 million (including the current award) before an E-1472 is required for contract award. If your contract is partially or fully Operations & Maintenance (O&M) funded, please contact PWCG for additional instructions.

Note 2: If you discover that an E-1472 is required to award your contract please STOP using this procedure summary and contact PWCG to request the procedure for awarding a contract via an E-1472. DO NOT continue following the remainder of the steps below.

23. It is acceptable to attach an unsigned copy of the agreement for the initial signatories on the award document.
24. Once the contracts and insurance are returned and the award document has been signed and approved by the Comptroller, the PM will attach the four original wet signature copies of the agreement, a copy of Comptroller's Certificate and all insurance documentation to the award document and forward the package to PWCG for review.
25. PWCG reviews the award document (PA 2625 or 1544), Comptroller's Certificate, contracts, insurance and endorsements, signs the contracts, then forwards the package to the City Attorney's Office for final signature.
26. The City Attorney's Office reviews the contracts and insurance. If all is acceptable, the Attorney's Office signs the contracts and notifies PWCG when ready for pick up.
27. PWCG forwards the contract package to the PM for delivery to City Clerk for recording. The City Clerk notifies the PM when ready and the PM delivers two (2) duplicate original contracts, a copy of the PA 2625 (or 1544), a copy of Comptroller's Certificate, and insurance certificates and endorsements to PWCG.
28. PWCG issues Notice to Proceed (NTP) and retains one duplicate original contract for their file and forwards the second duplicate original contract to the Consultant along with the NTP letter. Copies of the contract and the NTP letter are also sent to the PM for their files. PWCG assigns a Purchase Order (PO) number at this time.